

**Judicial Staff Education Committee**  
**Approved Minutes**  
**March 8, 2013**  
**10:00 am – 2:00 pm**  
**Arizona Supreme Court – Education Services Division**

Attendance: Present in person, Present Telephonically, Absent, AOC staff in attendance, Guest

<b>Present In Person:</b>	<b>Present Telephonically:</b>	<b>Absent:</b>
Kip Anderson, Chair	Kathy Schaben	Karen Forner
Rafaela de Loera, Vice Chair	Gretchen Maynard	George Hofer
Mary Jane Abril	Coleen Stevens	Joe Legander
Shelly Bacon		Dr. Bernie Ronan, Ph.D.
Theresa Barrett	<b>AOC Staff in Attendance:</b>	Melva Watts
Mary Blanco	Gabe Goltz	
Carla Boatner	Renu Sapra	
JT Hilton	Harriet Ramsbacher	
Jodi Rogers	Jeff Schrade	
Suzette Williams		

1. Call to Order: The meeting was called to order by chairman Kip Anderson at 10:05am.
  - a. Members introduced themselves utilizing American Sign Language to spell out their name or initials.
  - b. New AOC Education Service Division staff member Ms. Renu Sapra was introduced. She will be taking over Gabe Goltz's duties as the primary AOC staff member.
2. Review/Approval of Minutes:
  - a. Suggested correction to the minutes: In Section II, c., iii., the minutes stated that Shelly Bacon agreed with Mr. Anderson regarding Judge Burke's excellence as a speaker at the Court Leadership Conference in October, 2012. This was actually not noted by Ms. Bacon. Ms. Bacon made a motion to accept the minutes as amended. Ms. Jodi Rogers seconded. The minutes were approved as amended.
  - b. *Review of Completed Action Items:*
    - i. Mr. Goltz requested that members review the 2013 Committee Membership directory in their packet and advise staff of any corrections in spelling, title, etc.
    - ii. Joe Legander reported to Mr. Goltz on the Title VI updates – he thought the updates may be too specific to the Maricopa County Superior Court Clerk's Office and may not be worthwhile for the entire committee. If anyone is interested however they should contact Mr. Legander directly to get further details.

- iii. Facilitated vs. non-facilitated training – Mr. Goltz reported that an Administrative Order went out that adjusted the cap for non-facilitated COJET hours.
- iv. 'Swinging for the Fences' ideas will be addressed later in this meeting as noted in the agenda under "Strategic agenda suggestions."

### 3. Chair/Vice Chair Updates:

- a. *Court Administrator's Meeting* - Mr. Anderson updated the committee on the most recent court administrator meeting where case processing standards and interpreter issues were discussed. Work is currently being done by the committee chaired by Justice Brutinel on case processing and is currently out for comment. Also discussed was the CLIA training for presiding judges, and in fact the first part of that training was held last week.
- b. *COJET broadcast* - Mr. Anderson asked Mr. Goltz to talk about the COJET broadcast. Administrative Order #2013-08, which the Chief Justice signed in January, temporarily increased the cap on non-facilitated hours from 8 to 10 for fiscal year 2013. This was issued as a means of easing the transition back to 16 total COJET hours per employee per year. As a result of much discussion at COJET, JSEC and JCCE over the impacts of this change, Education Services instituted a new, on-line video series of Arizona historical cases available on [www.azcourts.gov](http://www.azcourts.gov). Mr. Goltz demonstrated how to access the videos and played a little of each of the 3 segments (modules range from 25 – 45 minutes in length). All 3 modules are accredited for both ethics and the 2013 core topic of 'current and local issues in the courts.' Although these were primarily designed as non-facilitated sessions, each can be turned into a facilitated session by viewing in a group setting, having a sign-in sheet, some discussion questions and some form of evaluation. In answer to a question from Ms. Barrett, Mr. Goltz advised that if courts are interested, they should coordinate with their local Training Coordinator and Human Resources department. He further noted that the speakers featured in the videos are from the AZ Humanities Council ([azhumanities.org](http://azhumanities.org)) which is a fully funded speaker's bureau and a great source for low cost speakers. Training Coordinators have been informed they will be getting questions about this series of videos, and it will also be addressed at the upcoming Training Coordinator's Conference. Committee members are encouraged to spread the word about this exciting video series in their courts and organizations.

### 4. Regional/Local Updates and Subcommittee Reports:

- a. *Local updates*: Mr. Anderson again welcomed Suzette Williams as the new chair of JCCE. She reported that JCCE met in January where the baton of leadership ('the cupcake') was passed to the new co-chairs, Ms. Williams and Ms. de Loera. They asked for commitments for 2013 from all members. Their main focus is on the June conference, and a planning sub-committee has been formed. Ms. Williams and Ms. de Loera met with Dyhanna Anderson to discuss how to meet the needs of both the southern and northern parts of the state. Mr. Goltz asked if this conference is the 'June Jam?' She indicated that this has been the traditional name which may stay the same this year or be re-named - more to come. The conference is looking for funds to support their efforts, however, it is open to all at no charge. Mr. Goltz applauded their commitment

to bringing training to more rural areas. The conference will be held on June 26 through June 28 (same dates as the Judicial Conference). In 2012, 60+ topics were covered during the three days targeting job specific training to different types of court employees. Mr. Anderson remarked how he was pleased to see the north county teams involved in the process this year.

- b. *ACA updates:* Ms. Bacon, the incoming president for next year, reported that she will be keeping the committee apprised of what is happening going forward. Registration is in progress for their Spring Conference and closes on April 2. The correct dates for the conference are April 17 – April 19. Historically a good time is had by all, and it is a great opportunity to mingle and network with old friends and make new contacts. There will be no fall conference this year, but they hope to reinstitute if for 2014. Mr. Goltz noted that the topics are very worthwhile and include a variety of hard and soft skill classes. It is cost effective and fun. Mr. Schrade advised that the opening plenary will be presented by a speaker from the Williams Institute for Ethics, a nationally renowned organization that is donating their services to come speak to the group. The conference will be held at the Prescott Resort.
- c. *Security sub-committee:* Mary Jane Abril reported on the following:
  - i. The template for emergency planning has been blessed by the Pima County Office of Emergency Management and has been submitted to her administration for approval as well. Once any requested changes are made, she will forward the template to JSEC for review.
  - ii. There is a full scale multiple agency active shooter drill being planned for Pima County in September. If any committee members are interested in attending, she will forward the finalized dates of the drill.
  - iii. Ms. Bacon advised there is an upcoming Security meeting on March 22. This committee is chaired by Bob Lawless.
  - iv. Mr. Anderson noted that the NCSC is putting on a national training in Phoenix sometime in April. Spots are still available if you are interested.
- d. *Local updates:*
  - i. Mr. Goltz advised that the first week of the Presiding Judge Leadership Academy, under the auspices of CLIA, was just successfully completed. It was an inaugural training bringing together a variety of judges with differing levels of experience and representing different types of jurisdiction. He noted that individual sessions can be pulled out and presented as standalone training. If members are interested in obtaining any of this material, please contact Education Services. As a last note, he thanked Harriet Ramsbacher for her assistance and hard work on this pilot program.
  - ii. He also reported that the annual Judicial Conference is coming up in June. The agenda has been finalized and looks to be very exciting. The theme is: 'Stepping Up – Every Judge a Leader.' He asked committee members not to share program details until the brochure actually goes out. Many presentations will be broadcast and uploaded to the web for viewing. Registration materials should be sent out around April 1, depending on feedback from faculty.

## 5. Court Services Division Update:

- a. Ms. Barrett distributed a handout detailing the updates from her division since November, 2012. Highlights include:
  - i. Multiple wireless rule changes are out for comment at this time and adoption of the changes are possible in August or September of this year.
  - ii. The state bar is looking at potential changes to the jury instructions.
  - iii. There are 56 bills impacting the courts in the current legislative session.
  - iv. The poverty guidelines were updated by the federal government in January and posted to the AOC Self Services website.
  - v. A change to the rules for handling victim's names goes into effect on 9/1/13.
  - vi. New interpreter cards have been posted on Wendell.
  - vii. Yuma County is piloting a remote interpreter project whereby interpreters based at the Superior Court location or at the AOC will be utilized for routine cases in some outlying areas. This is expected to create a lot of cost savings and the hope is to expand the project statewide. As the contact for Yuma County, Ms. Schaben added that equipment has been installed, and testing is to commence shortly. Courts will be able to connect with the jail and to remote Justice's of the Peace with everyone on both ends able to see and hear.
  - viii. New filing fees for Superior and Justice Courts go into effect on 3/18/13
- b. Mr. Anderson asked the committee that with all the items having been mentioned above and all the new projects being put out by the AOC, if they had any thoughts about what projects the committee might grab hold of and get involved with. Something to keep in mind going forward.

6. Education Services Updates:

- a. *Statewide Needs Assessment:* Mr. Goltz announced that in an effort to provide support for Training Coordinators, a statewide needs assessment, headed by Ms. Sapra, is coming in the next couple of months. One of the first critical steps in this effort is to determine the needs of the courts. A work group will be formed to design and deploy the assessment which will probably be on-line. The goal will be two-fold: to provide individual coordinators information about needs expressed by their individual courts and to provide Education Services continued direction on what support can be provided to Coordinators both locally and state-wide. Ms. De Loera and Ms. Blanco volunteered to work with Ms. Sapra in the work group. If anyone else is interested, please contact Ms. Sapra, and she will be delighted to add you to the work group. Mr. Goltz expressed hope that this assessment will produce excellent data on both a macro and a micro level (down to the individual court) as to the training needs and training gaps for years to come.
- b. *New COJET Evaluation Form:* The new COJET evaluation form (aka 'bubblesheet') was reviewed by the committee. Mr. Goltz noted this evaluation is two-sided and has some different questions than earlier evaluations. The hope is that by asking different questions, better results in terms of continuous improvement will be obtained which, after all, is the point of evaluations. Rather than focusing on numbers, shouldn't the focus be on how classes can be made better? Mr. Goltz indicated that the new questions are really the heart and soul of this change in the form. All courts are encouraged to use this new form and/or to take advantage on the multitude of free on-

line tools for evaluations and needs assessment. He also noted that the form is not static and can be changed as different needs are identified.

- c. *2013 JSEC Core Broadcast:* Resurrecting an old idea, Mr. Goltz proposed to the committee the idea of doing a live 'core' broadcast. The core training topic for this year is 'current and local issues impacting Arizona's courts.' This is a very broad requirement and could include training on new processes, customer service, new legislation, etc. Courts will be scrambling to meet the need, so he is proposing that JSEC sponsor this broadcast as a way to fulfill it, especially toward the end of the year when employees are rushing to complete their COJET requirements. He further noted that the legislative report is a powerful tool for learning about new laws and their impact upon the courts. This could potentially be a topic to include in the broadcast as well. Ms. De Loera noted that JSEC seems to have lost some of its' visibility over the years by no longer providing regional conferences, broadcasts, etc. as they used to do, and she feels this will be an excellent way of re-branding itself going forward. JT Hilton suggested the eventual roll-out of Windows 8 or fixes to the case management system as additional topics for training opportunities. Per Mr. Goltz, the anticipated timeframe for the broadcast is mid to late fall of this year should the proposal be approved by JSEC. The initial goal is for a draft agenda (the concept, not the details) to be presented to JSEC at the August 9 meeting. Beth Asselin of Education Technologies is actively working on the project. The intent is to archive the broadcasts so they can be used as non-facilitative sessions later on. Ms. De Loera noted that the potential to do an excellent live broadcast what with the experience and personnel within Education Services and JSEC is here and should be pursued. Ms. Barrett concurred and also noted that the Commission on Minorities is looking for some sort of collaboration to follow up on a previous cultural diversity broadcast. Ms. De Loera, Ms. Barrett, Carla Boatner and Gretchen Maynard volunteered to participate in a work group under Ms. Sapra's guidance. Mr. Anderson determined that the work group will take all of the suggested ideas and present an outline of their plan for the broadcast at the next meeting.
- d. AZTEC trainers are seeing an increased request for training due to increased court turnover. It does not appear to be happening in all parts of the state however. Mr. Schrade noted that at the recent AOC director's meeting it was announced that the annual turnover at the AOC is 15% with the top 2 reasons being retirement and relocation. Mr. Goltz added that with the upturn in the economy and the job numbers getting better courts should expect to see and feel the effects of relocation and retention and experience a need for increased training for all employees.
- e. Ms. Schaben noted that Yuma County is creating a Mental Health post conviction court on 4/15/13, and they are currently in the process of developing performance measures.

#### 7. Upcoming Strategic Agenda Update and Timeline:

- a. Mr. Schrade refreshed the committee on their discussion from the last meeting regarding the strategic agenda, noting that every 5 years the AOC adopts a new strategic agenda. The new agenda covers 2014 through 2019. While a good list of ideas has already been put together, Mr. Schrade is giving the committee one last opportunity to identify the ideas that are most important to JSEC. The top ideas will be discussed on a March 20 call and then presented at the next COJET meeting on March 22. The top ideas from that meeting will then be passed on to the AZ Judicial Council for

consideration in the strategic agenda. After an open discussion, the committee came up with the following list:

- i. *'Project management' leadership training for all staff* - suggested by Ms. Barrett. JT Hilton noted that Deb King had done a 12 week leadership training ('Achieve Global') 5+ years ago that was excellent. Mr. Goltz noted that there are existing ACM leadership classes which touch on this subject but don't focus on it.
- ii. *Court clerk certification* - Mary Blanco championed this idea as a state wide priority.
- iii. *Judicial Assistant certification* – Mr. Anderson suggested that this would also be a good opportunity.
- iv. *Singular statewide mandated judicial orientation* – Mr. Goltz lobbied for this idea noting that there is a unique culture to the judicial branch which isn't found anywhere else. There is an existing requirement in the code that all new employees get orientation. Education Services used to offer something in 1996 but it needs to be revamped to reflect today's issues and concerns and to give new employees the necessary foundational information about court responsibilities and the purposes of the court. Ms. De Loera seconded this idea advising that Pima County just completed a very successful revamp of theirs utilizing an audience response system.
- v. *Unified judicial branch repository for on-line training* - Ms. Barrett noted that lots of different departments have great training to offer but not everyone knows where to look for these programs. There needs to be a 'one stop shop' so to speak for this information.
- vi. *Moving focus from COJET hours to purposeful education planning* – Mr. Schrade is interested in creating some tools for managers to help employees make the most out of their 16 hours; to help leaders plan education that fits specific needs rather than simply undergoing 16 hours of generic training.
- vii. ***Prioritization of the top ideas*** - Mr. Anderson asked if the ideas discussed above should be prioritized in some way for presentation on the March 20 call. Ms. Barrett also suggested webcasts on specific topics. Mr. Goltz reminded the committee that Ms. Sapra is already working on this plus the statewide needs assessment. Please get any additional suggestions to Mr. Anderson by March 19. Otherwise, the top three ideas are as follows:
  1. *Revitalization of a statewide NEO (new employee orientation) plan*
  2. *Statewide educational needs assessment*
  3. *Statewide court clerk and JA certification programs*
  4. *Underlying theme/ ultimate goal → moving focus from COJET hours to an education plan/professional development*

8. JSEC 2013 Goals Discussion:

- a. Mr. Anderson asked the question of what should we be doing to promote JSEC in 2013.
  - i. He noted that he had sat through a JSEC orientation session prior to the start of this meeting and questioned whether the goals stated in the binder are still worthwhile (monitor quality of education; recommends changes in policies and standards; approves guidelines for accreditation of programs; oversees and maintains judicial competence throughout the state; and develops and

implements educational policies and standards)? Is this something that needs to be looked at?

- ii. Ms. De Loera proposed one statewide conference for all judicial staff, whether or not that would be in Phoenix or in some alternative setting. She noted that there is a lot of pride in meeting and networking with other judicial staff.
  1. Ms. Blanco inquired if there is funding for this sort of conference and what types of courts should be included; i.e. how big can we dream?
  2. Ms. De Loera suggested that local meetings done statewide might be the answer. This would be an excellent opportunity to get JSEC's name out there.
  3. Ms. Rogers asked if this might be accomplished electronically or via a web broadcast.
  4. Per Ms. De Loera, originally there were 3 regional staff conferences held throughout the year in Phoenix, Flagstaff and Tucson to help with the logistical problem. Agendas for these conferences were discussed at the JSEC meetings and only limited by creativity. Finding faculty was usually the difficulty but Education Services was able to overcome that.
  5. Ms. Rogers suggested that this doesn't need to be done in one day – it could be broken down into small sessions. Black Canyon Conference Center was suggested as a possible location as it had been used in the past.
  6. Mr. Schrade questioned whether the recovering economy has hit the courts yet and whether the budget exists for employees to participate in something like this. Budget and travel are the big barriers. Is now a good time? Other possibilities are to use Skype or video conferencing without compromising court security or restricting what can be accomplished. Ms. De Loera suggested starting with something small and virtual. In the needs assessment include a question about this: as a Training Coordinators, could they could afford to send employees to a statewide conference (maybe mention at the upcoming TC conference)? Ms. Bacon mentioned that registration for the ACA conference might be a good barometer of the court's economic situation. We need to be cognizant of not stepping one another's toes if too many conferences are proposed however.
  7. Mr. Goltz suggested that a day-long virtual conference with different topics might be feasible – Beth Asselin, Education Services e-learning manager, would have to provide input on whether this can be done. Mr. Schrade suggested following the standard conference agenda of an opening plenary, simultaneous breakouts held locally within the courts, a lunch plenary, more breakouts and then a closing. This would be a one-way broadcast that could be done mostly virtually with some parts in a local and/or regional conference setting. Having a conference theme might be a good thing. JSEC could sponsor some of the classes.
  8. Mr. Anderson suggested this idea could be rolled into the existing plans for the broadcast and 'sponsored by JSEC.'

9. Proposed Meeting Dates:

- a. August 9, 2013 - room TBD

- b. November 1, 2013 – room TBD

10. New Business and Call to Public:

- a. No new business and no public response

11. Review of Action Items:

- a. Mr. Goltz will report on the broadcast workgroup's plan for whatever the end product turns to be
- b. Report from the needs assessment project workgroup from Ms. Sapra

12. Motion to Adjourn:

- a. Motion to adjourn was made by Ms. De Loera. Ms. Rogers seconded. It was approved.
- b. Meeting adjourned at 1:20pm